Finalizing Claims and Interactions

Issue: Denying an Interaction. Authorizing claims, partial coverage claims, ordering sourced parts. Resolution:

1. Denying an interaction. After following SOP "How to Start a Claim or Log an Interaction" and you have determined using Forte contract that parts are not listed for coverage you must:
    a. Note **"Create Concern"** screen in detail for each **PNLC** item.
    b. How that part failed.
    c. Add **[Claim Note]** in the notes:
        i. Note who you spoke with.
        ii. Information provided about **PNLC**.
2. Verify information is correct. Click **[Next]**.
    a. Advised RF of details of **PNLC**.
    b. Then call CH to go over coverage:
        i. Speak with the CH.
        ii. Leave a detailed voicemail.
3. Verify interaction call details and select **[Reasons]** drop down for reasons why a claim is not to be started and select, then click **[Save & Next]**.
4. After following SOP: "Parts Verification", SOP "Labor Hour Verification Process" and we have contract coverage to authorize the claim.
5. Start by selecting the parts and labor eligible to the RF in the **[Unauthorized]** screen. Then you will click authorize.
6. The authorized summary screen will populate to go over totals with the RF for parts, labor, and deducible. Click **[Authorize]** to get an authorization number.
7. After authorizing the claim, the estimate will move to **[Authorized/Cancelled]**.
8. Now that you have contract coverage you will need to add an authorization note, start by clicking **[Actions]**, then click **[Notes]**, click **[Add Note]**. Select **[Authorize Note]** as the category. Make sure to include the following. This can be done in more than one authorization note
    a. How you verified failures.
    b. What part is being authorized **(RF part or sourced)**.
    c. Who you gave authorization too.
    d. Verified payment information on file is correct
    e. Calling CH for OOP
9. RF authorization number can be found on the **[Authorizations]** tab.
10. After giving authorization number to RF advise how to submit for payment.
11. Advise the following must be on the final invoice:
    a. CH name matching contract
    b. Full VIN number
    c. Part numbers for all parts called in
    d. Labor per repair
    e. Faxed or emailed

Authorizing with Denied Parts:

12. After following SOP: "Parts Verification", SOP: "Labor Hour Verification Process" and we have contract coverage to authorize the claim.
13. Start by selecting parts and labor not eligible to the RF in the [unauthorized] screen. Then you will click **[Deny]**.

Finalizing Claims and Interactions

14. Verify denied totals and select **[Denial Reasons]** drop down and scroll down for reasons why a claim is not eligible and select, then click **[Deny]**.
15. Estimate line items are now in the **"denied"** section of the **[Estimate]** tab, with eligible parts still in the **"Unauthorized"** section.
16. Select parts, labor, and deductible eligible to the RF in the **[Unauthorized]** screen. Then you will click **[Authorize]**.
17. Review authorization summary **"details"** screen, then click **[Authorize]**.
18. An **"Authorize screen"** will then populate giving a full breakdown of coverage to go over the authorization with the RF.
19. Go back to steps 8-11 and finalize authorization with the RF.

Authorization with Ordering Sourced Parts:

20. After following SOP: "Parts Verification", SOP: "Labor Hour Verification Process" and we have contract coverage to authorize the claim with ordering sourced part.
21. Start by selecting parts, labor, and deductible eligible to the RF in the **[Unauthorized]** screen. Then you will click **[Authorize]**.
22. Review authorization summary details screen, then click **[Authorized]**.
23. Now you have an authorized estimate to go over totals with the RF for labor and deductible. Here is where you go over parts options WITHOUT authorizing the part to the supplier.
24. If the RF allows parts to be shipped in and you have spoken directly with the CH to get approval to ship parts for repairs. Click **[Parts]** to find the sourced part/s, select part/s sourced and click **[Order part]**.
25. A confirm order screen will populate, to complete order you must click **[Save]** to order part.
26. To verify part was ordered refresh the claim and click **[Estimate]** tab and click **[Authorized/Cancelled]** section. Where will you now see part order from supplier.
27. Now go back to steps 8-11 and finalize authorization with RF.

Related References and Documents:

SOP: Finalizing Claims and Interactions Claims

SOP: Parts Verification Claims

SOP: Labor Hour Verification Claims

Author Date: 06/28/2023

Purpose

This SOP is intended to outline the steps taken in denying an interaction. It also outlines how to authorize claims with repair facilities parts, with denied parts, and with ordering sourced parts.

Teams Impacted

- Small Claims
- General Claims
- Technical Claims

Related References or Documents

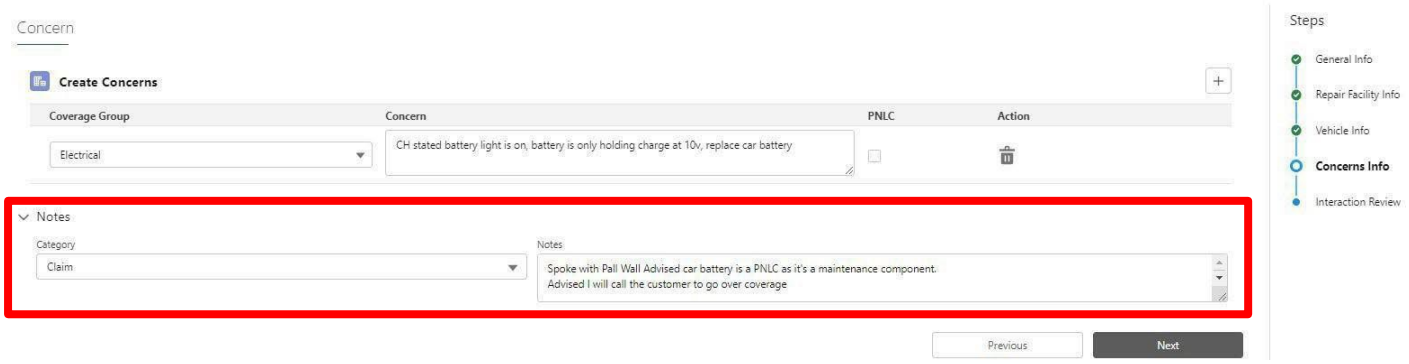
- SOP: How to start a claim/ interaction.
- SOP: Parts Verification
- SOP: Labor Verification

Procedure

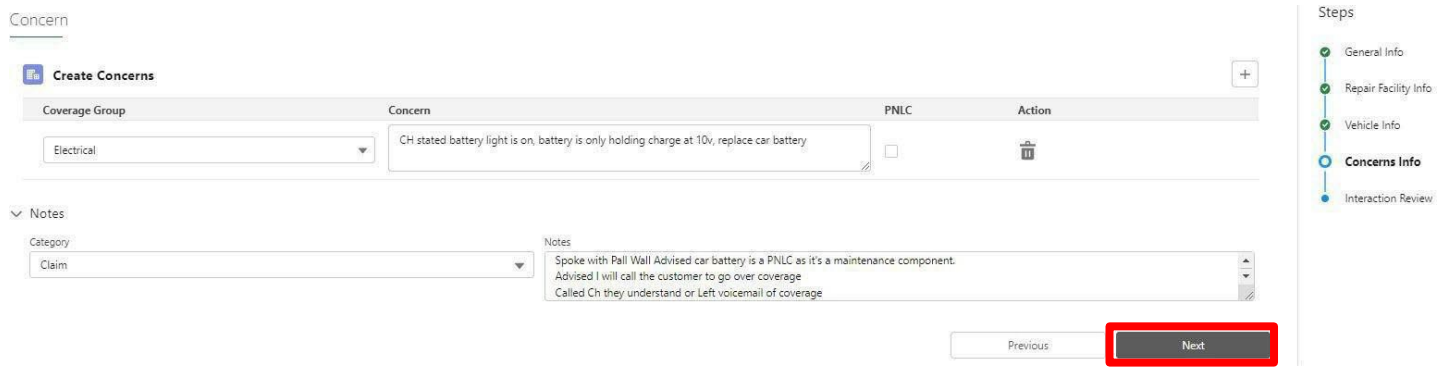
Denying an Interaction

Important! Only parts not listed for coverage can be denied in an interaction. If the part is listed for coverage a claim MUST be started.

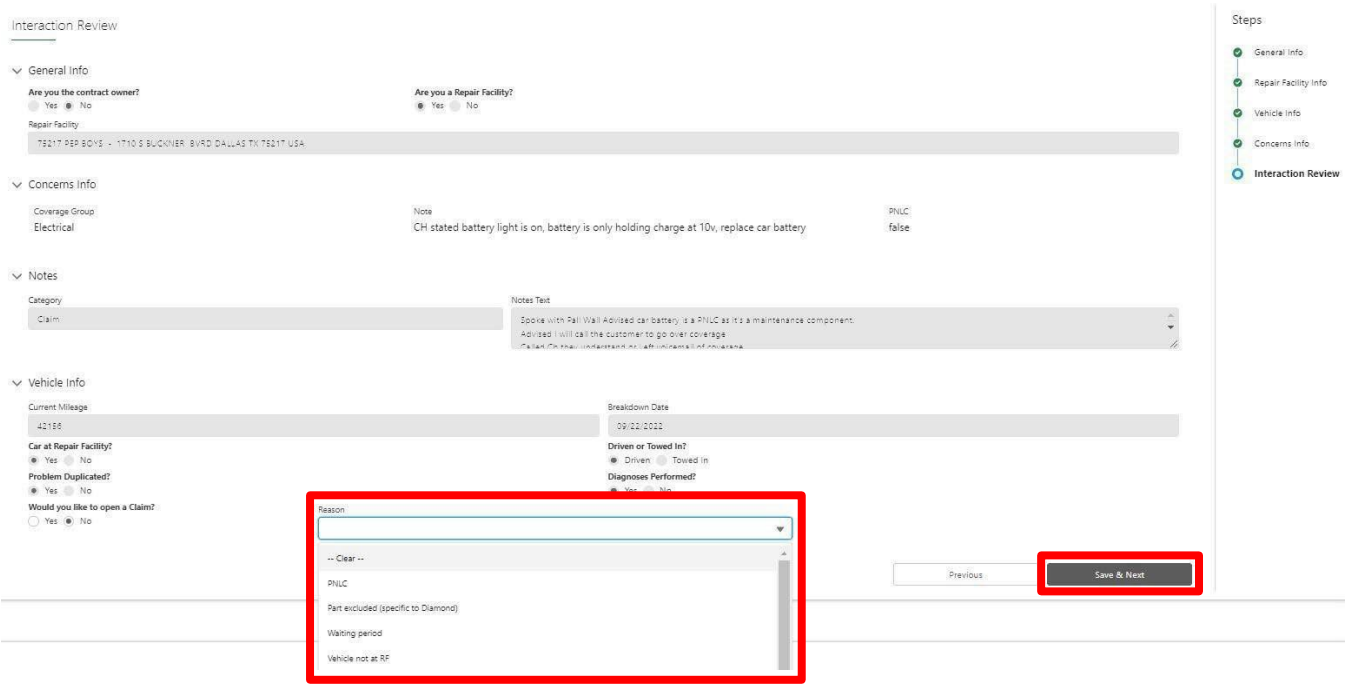
1. After following SOP: How to Start a Claim or Log Interaction and you determine based off Forte that contract parts are not listed for coverage you must:
   a. Note in the Create Concern screen in detail each part not listed for coverage
   b. How that part failed
   c. Add **[Claim Note]** in the notes:
      i. Note who you spoke with
      ii. Information provided about PNLC



2. Verify information is correct. Then you must complete (see below) before clicking **[Next]**
    a. Advised repair facility of details of PNLC
    b. Then call the CH to go over coverage
        i. Speak with the contract holder
        ii. Leave a detailed voicemail

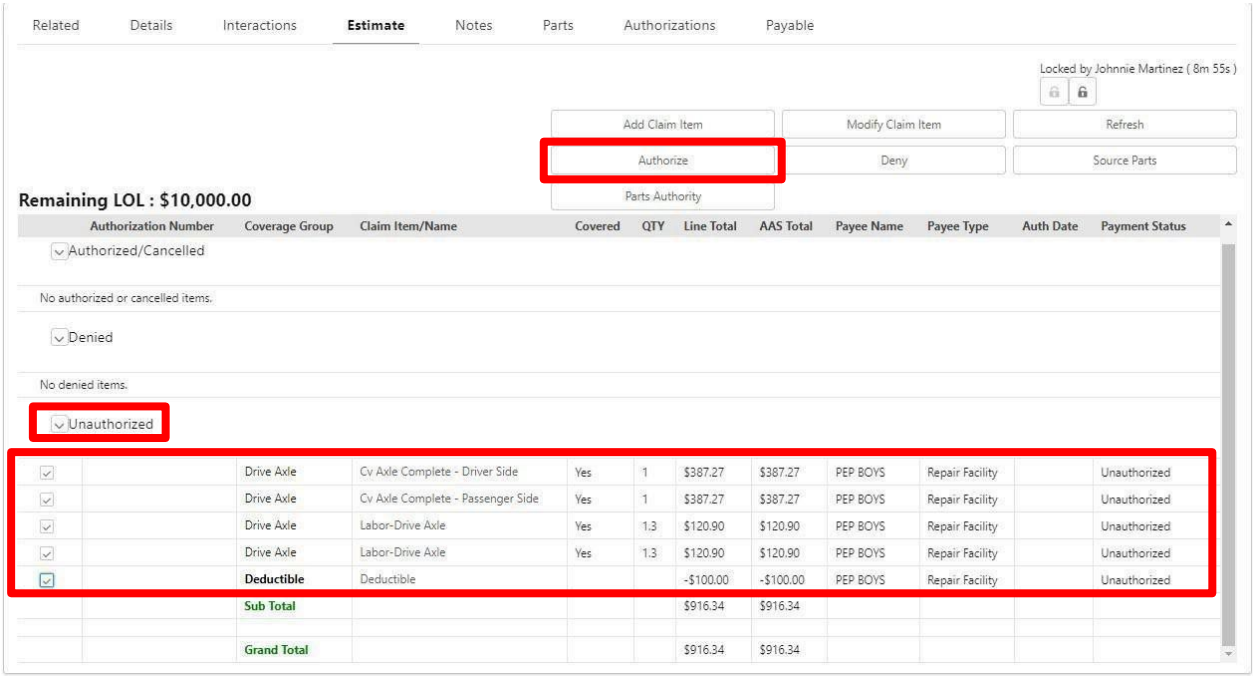


3. Verify interaction call details and select **[Reasons drop down]** scroll down for reasons why a claim is not to be started and select, then click **[Save & Next]**

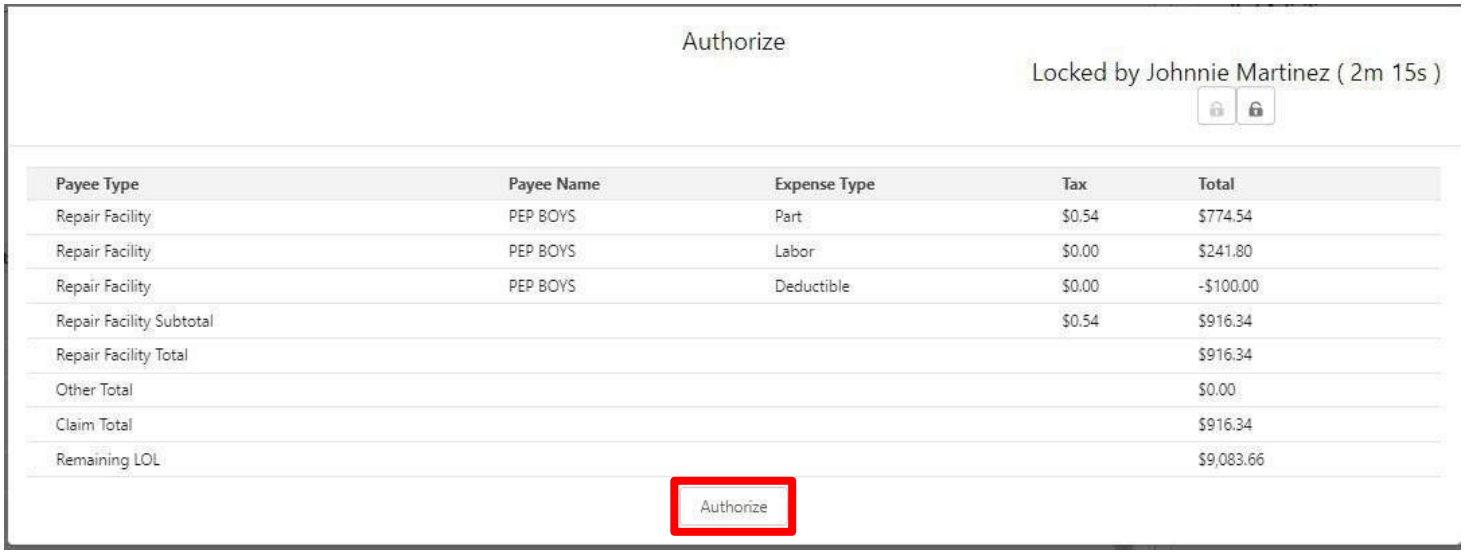


Authorizing Claims

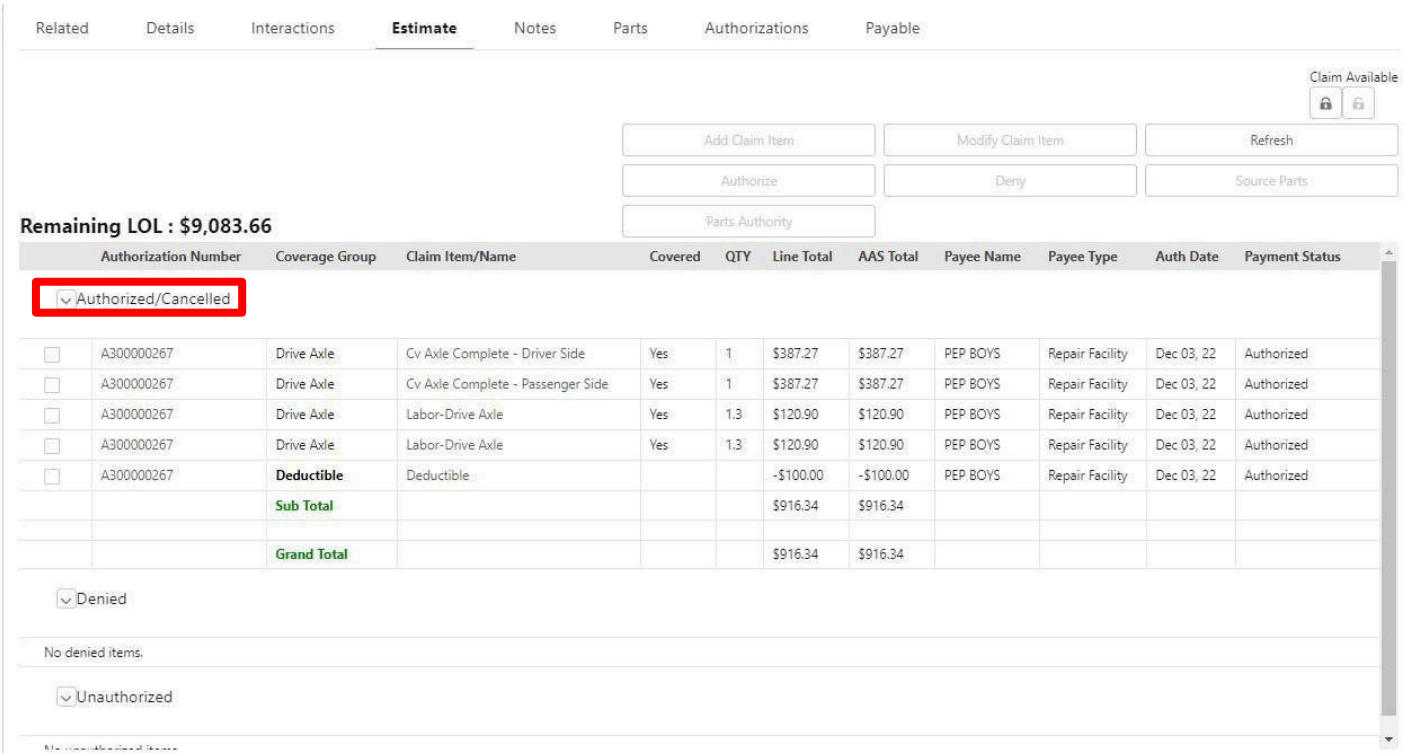
4. After following SOP: Parts Verification, SOP: Labor hour Verification process and we have contract coverage to authorize the claim.
5. Start by selecting parts and labor eligible to the repair facility in the **[Unauthorized]** screen. Then you will click **[Authorize]**.



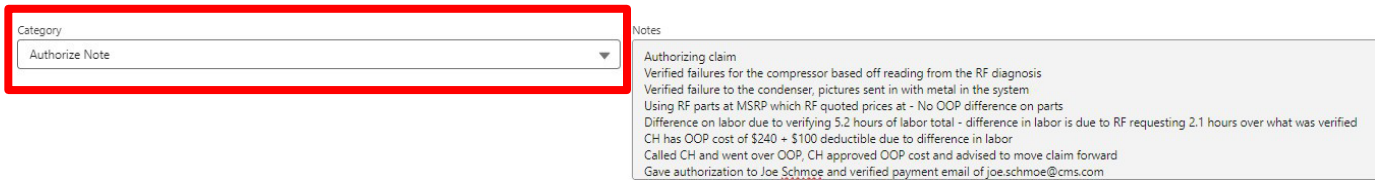
6. The authorized summary screen will populate to go over totals with the repair facility for parts, labor, and deductible. Click **[Authorize]** to get the authorization number.



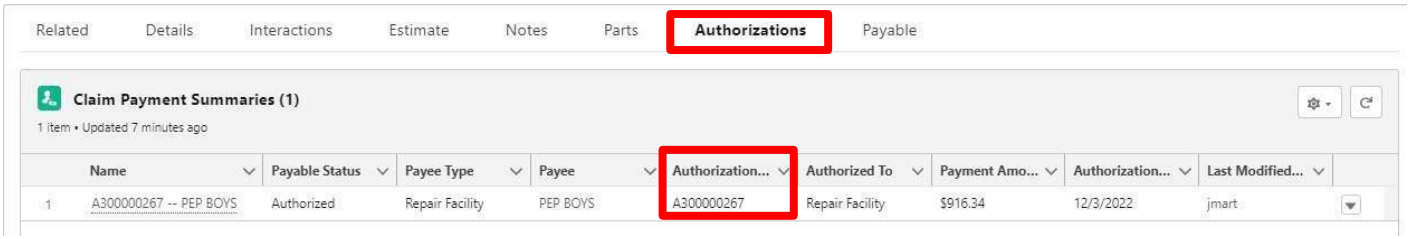
7. After authorizing the claim, the estimate will move to **[Authorized/Cancelled].**



8. Now that you have Contact coverage you will need to add an Authorization Note, start by clicking **[Actions],** then click **[Notes],** click **[Add Note].** Select **[Authorized Note]** as the category. Make sure to include the following (see below). This can be done on more than one authorization note.
    a. How you verified failures
    b. What part is being Authorized (Repair facility part or sourced)
    c. OOP Breakdown If applicable (note where the difference is parts/labor)
    d. Call customer to go over OOP if applicable
    e. Who you gave authorization to
    f. Verified Payment information on file is correct



9. Repair facility's authorization number can be found on the **[Authorizations]** tab.



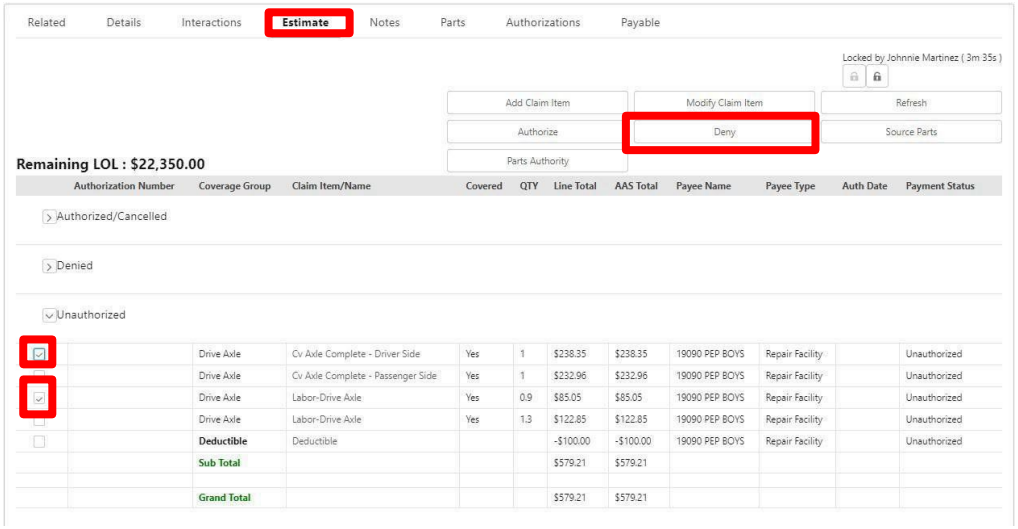
10. After giving the authorization number to the repair facility, advise how to submit for payment.

11. Advised the following must be on the final invoice:
    a. Customer name matching contract
    b. Full Vin number
    c. Part numbers for all parts called in
    d. Labor per repair
    e. Faxed or emailed

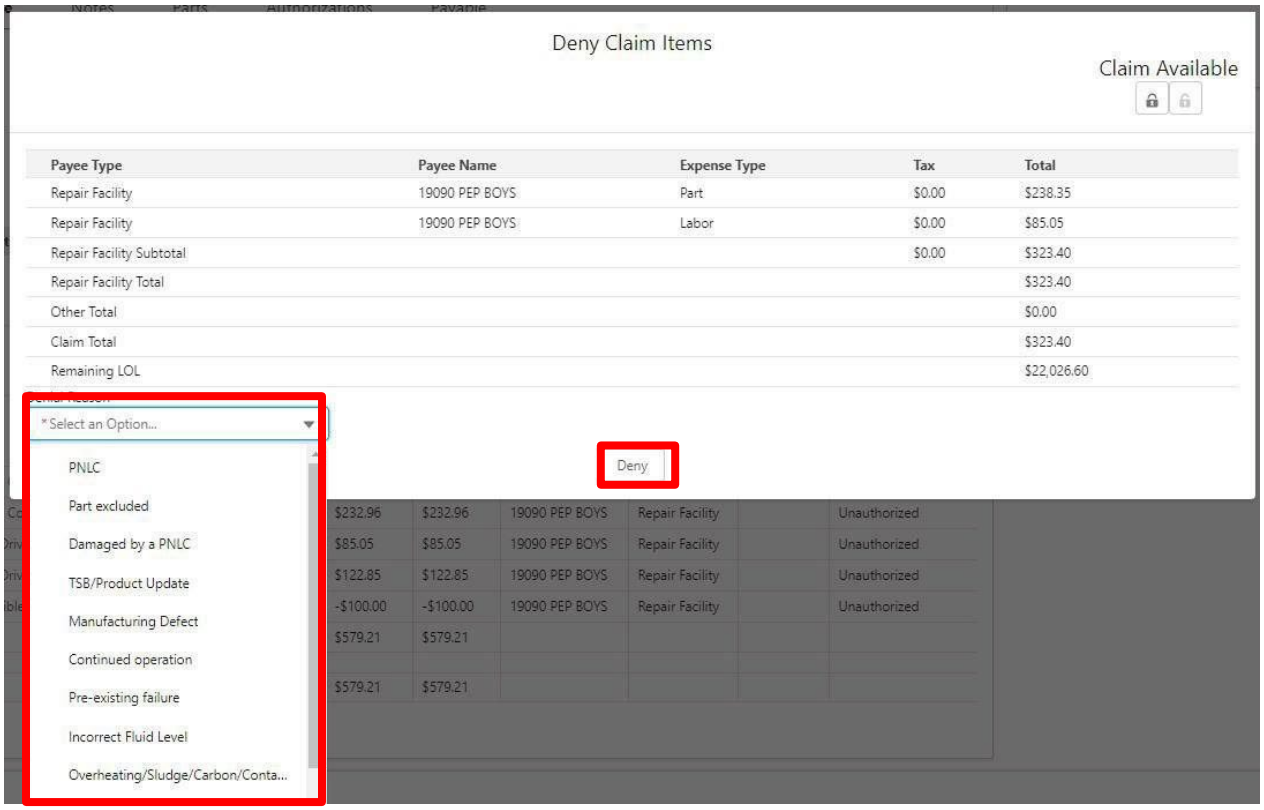
Authorizing with Denied Parts

12. After following SOP: Parts Verification, SOP: Labor Hour Verification Process and we have contract coverage to authorize the claim.

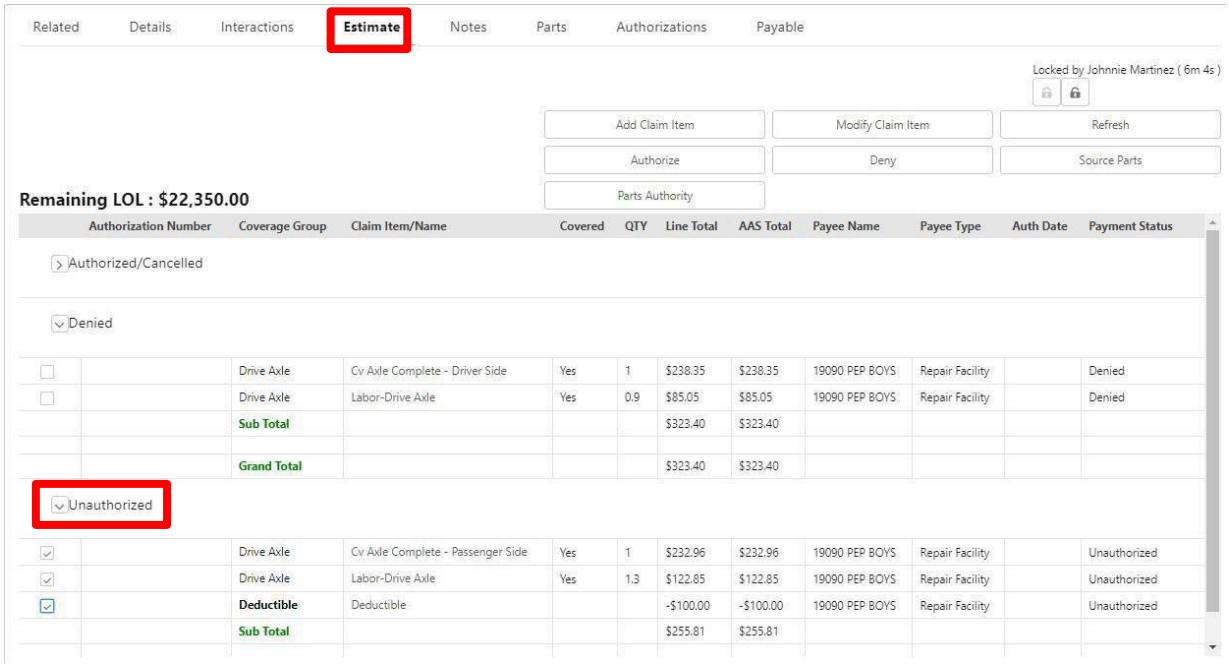
13. Start by selecting parts and labor not eligible to the repair facility in the **[Unauthorized]** screen. Then you will click **[Deny]**



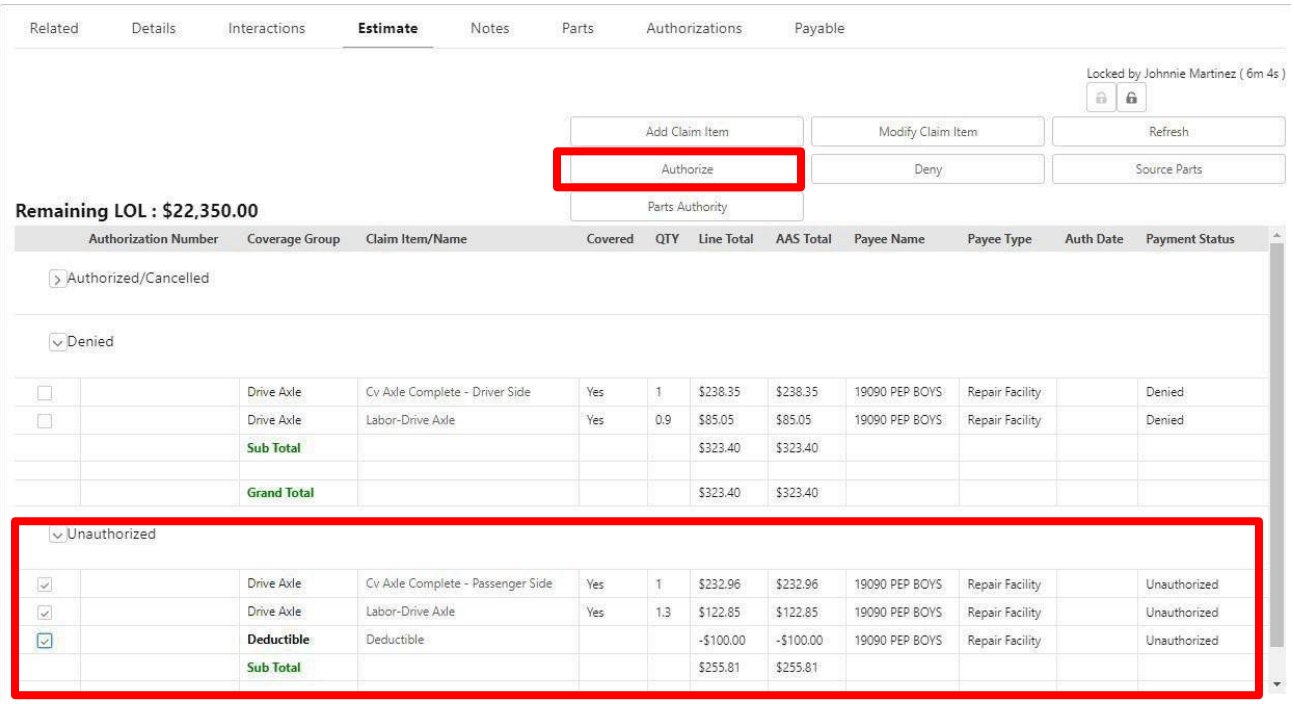
14. Verify denied totals and select **[Denial Reasons drop down]** scroll down for reasons why a claim is not eligible and select, then click **[Deny]**



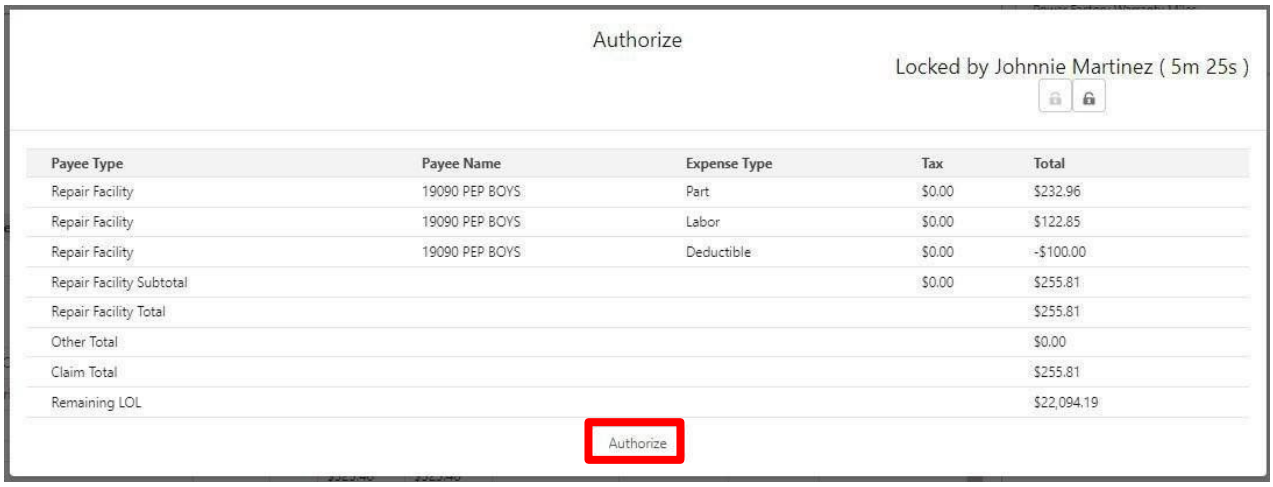
15. Estimate line items are now in the Denied section of **[Estimate]** tab, with eligible parts still in unauthorized section.



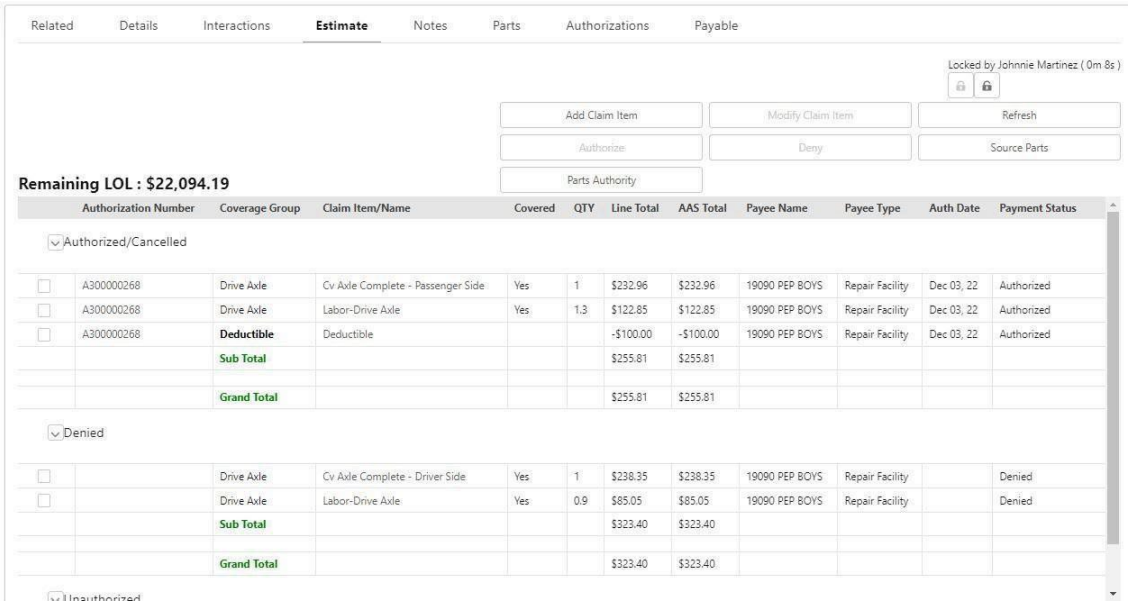
16. Select parts, labor and deductible eligible to the repair facility in the **[Unauthorized]** screen. Then you will click **[Authorize]**



17. Review authorization summary details screen, then click **[Authorized]**



18. Here is the full breakdown of coverage to go over auth with repair facility.

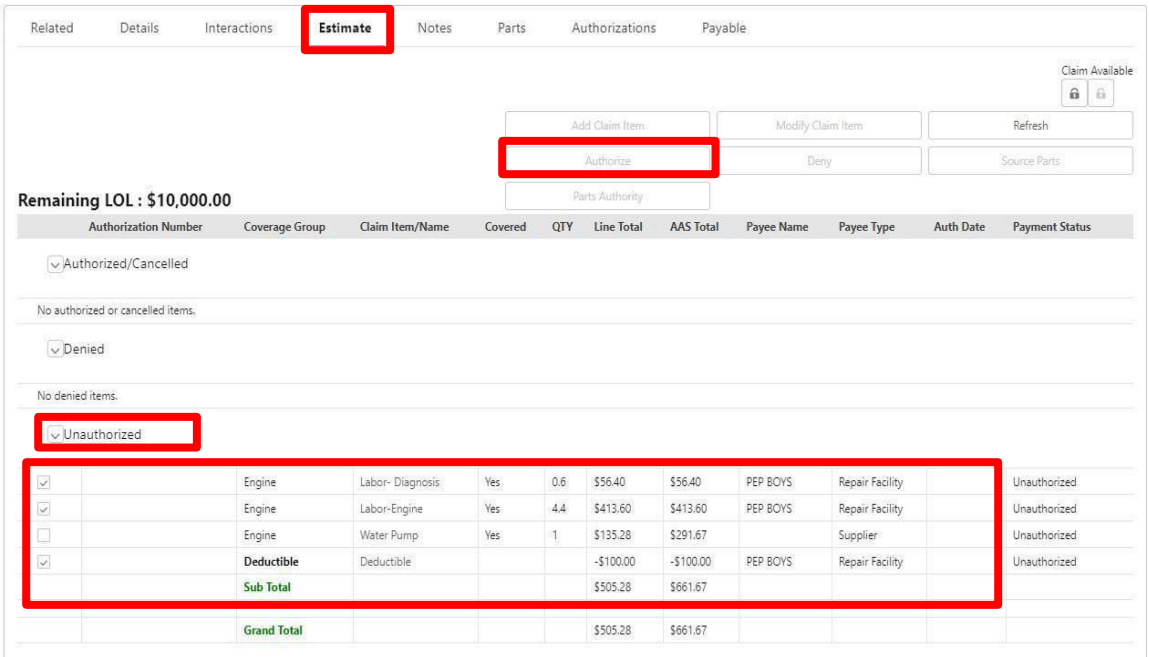


19. Now go back to step 8-11 and finalize authorization with repair facility.

Authorization with Ordering Sourced Parts

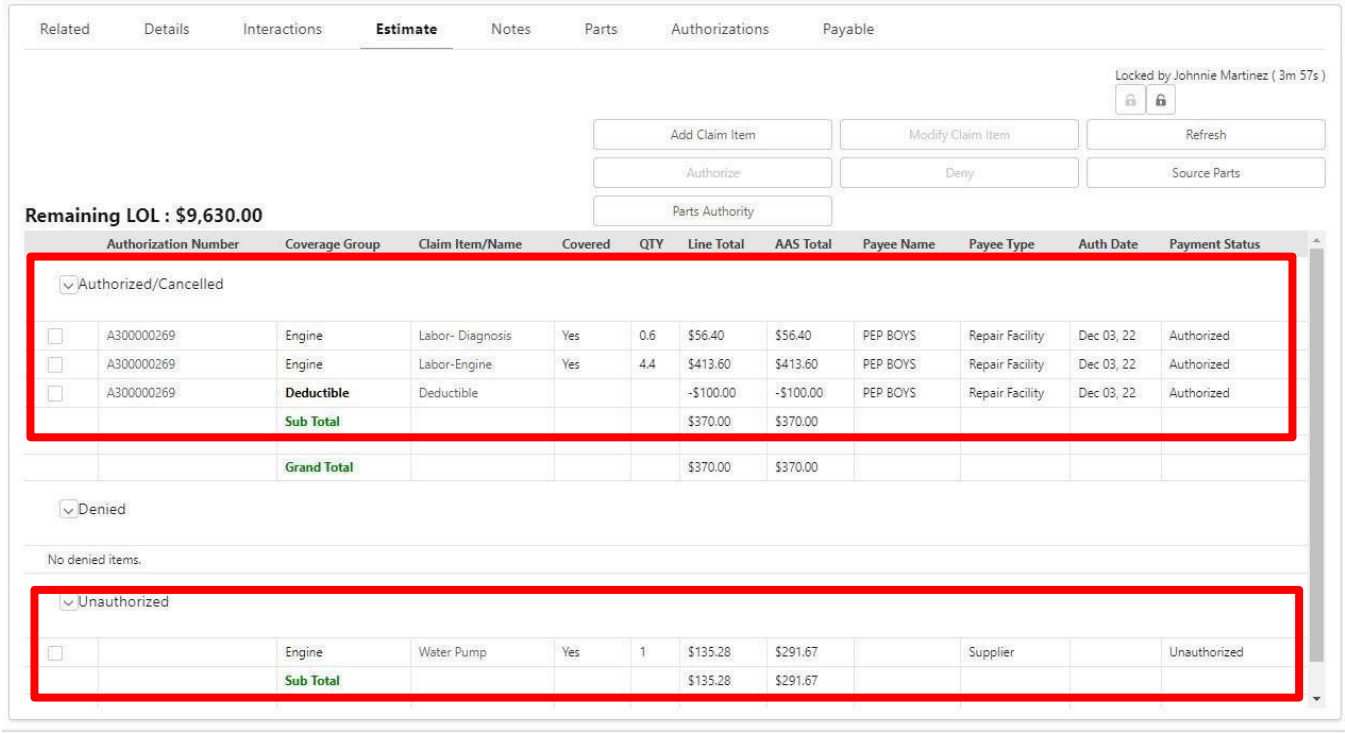
20. After following SOP: Parts Verification, SOP: Labor Hour Verification Process and we have contract coverage to authorize the claim with ordering sourced part.

21. Start by selecting parts, labor and deductible eligible to the repair facility in the **[Unauthorized]** screen. Then you will click **[Authorize]**

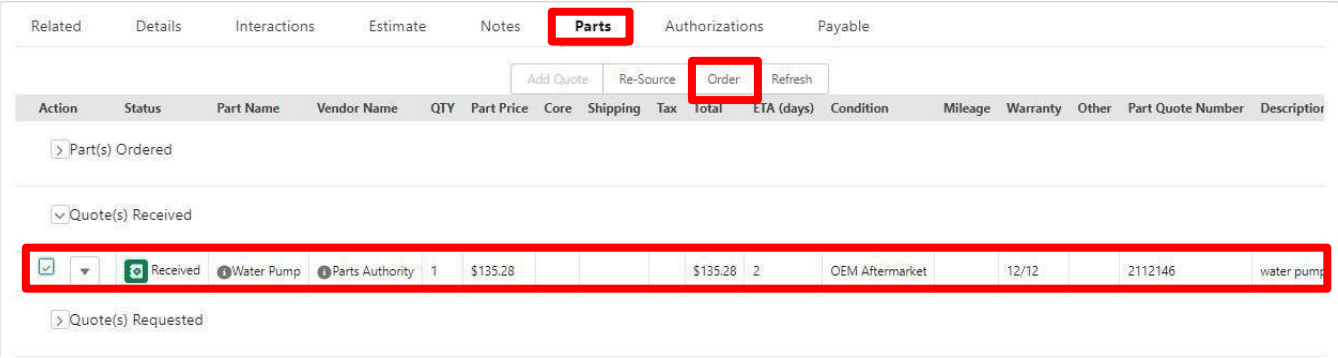


22. Review authorization summary details screen, then click **[Authorized]**

23. Now you have authorized estimate to go over totals with the repair facility for labor, and deductible. Here is where you go over part options WITHOUT authorizing the part to supplier.

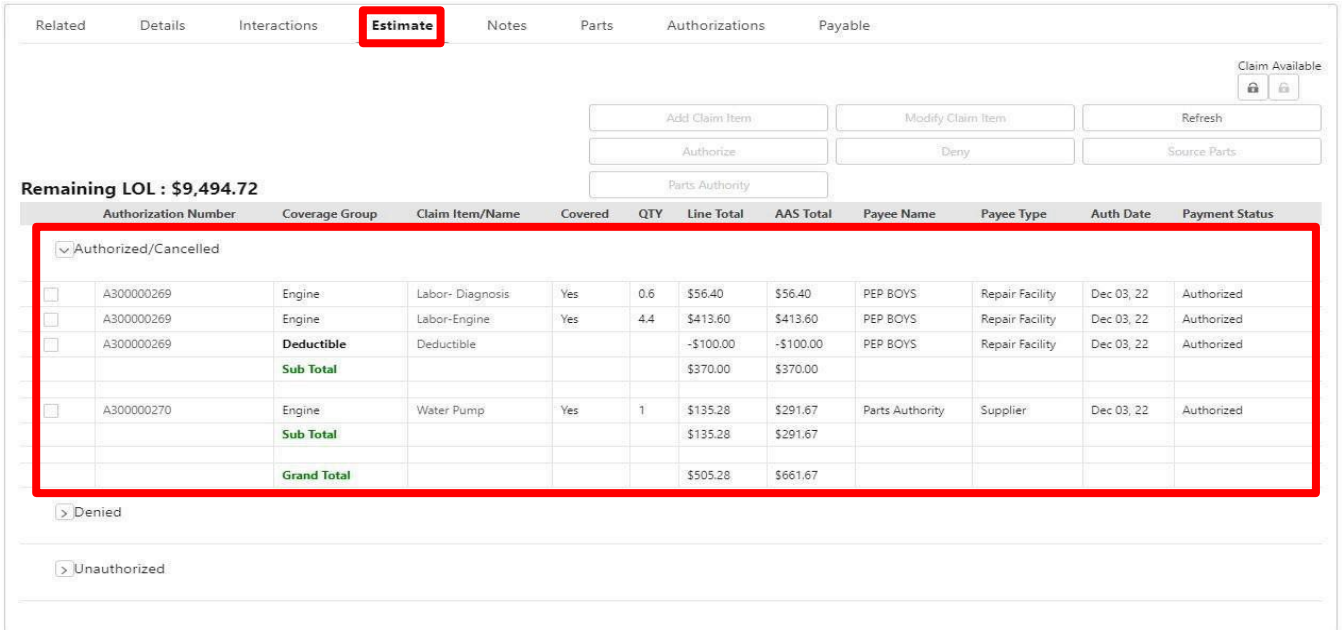


24. If repair facility allows parts shipped in and you have spoken directly with customer to get approval to shipped parts for repairs. Click **[Parts]** to find the sourced part/s, select part/s sourced click **[Order Parts]**



25. A confirm order screen will populate, to complete order you must click **[Save]** to order part.

26. To verify part was ordered refresh the claim and click [**Estimate]** tab and click **[Authorized/Cancelled]** section. Where you will now see part order from supplier.



27. Now go back to step 8-11 and finalize authorization with repair facility.

Verifying Part Ordered Status

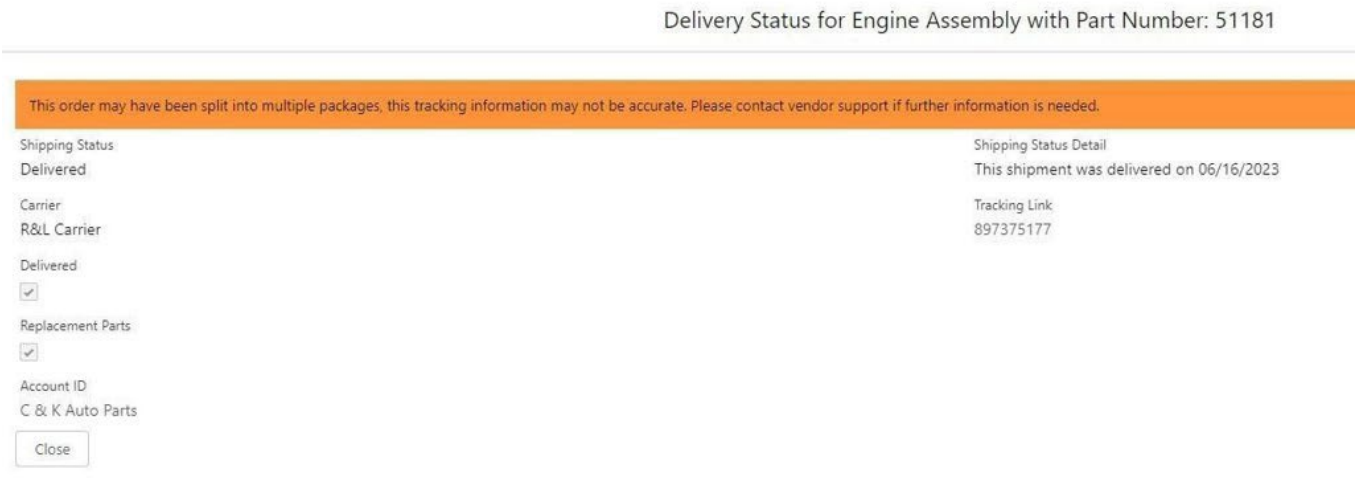
28. After an order is placed you will notice the update in Delivery Status information will be blank.

29. To get Delivery Status update, **click Drop Down Arrow** next to the placed part and **click Update Delivery Status**.

Important! If any errors pop-up reach out to Vendor Management.

30. A pop-up screen will appear with delivery details.

Important! Pay attention to the banner at the top if you have ordered more than one part.



31. After closing the pop-up screen the **Delivery Status** will update on the part line itself.

Approval & Revision

Date Created 02/28/2022	Created By Johnnie Martinez		Date Approved 3/10/2022	Approved By Jason Dolan
Date Revised 9/8/2022	Revised by Johnnie Martinez	Revision Description Updated auth note, grammar	Date Approved 9/20/2022	Approved By Jason Dolan
Date Revised 10/10/2022	Revised by Johnnie Martinez	Revision Description Updated auth note screen shot	Date Approved 10/13/2022	Approved By Jason Dolan
Date Revised 12/2/2022	Revised by Johnnie Martinez	Revision Description Updated to new CMS auth process	Date Approved 12/2/2022	Approved By Jason Dolan
Date Revised 6/22/2023	Revised by Johnnie Martinez	Revision Description Added Delivery status update process	Date Approved 6/22/2023 6/28/2023	Approved By Jason Dolan Kara Ness (L&D)
Date Revised 08/01/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Article	Date Approved 08/01/2023	Approved By Amanda Wiseman
Date Revised 05/06/2024	Revised by Araceli Garcia	Revision Description Updated authorization note screen and samples per new SOP process.	Date Approved 5/6/2024	Approved By Jeremy Tan